WELCOME: GETTING TO KNOW YOU

SUMMA® REALTY

Name: _____ Date: _____

Mobile Phone: _____ Home Phone: _____

email address: _____ Work Phone: _____

Home Address: _____

How were you referred to us: _____

Years in Real Estate / R.E. School Attended: _____

Annual Production: ☐ $0 - $1M ☐ $1 - $3M ☐ $3 - $6M ☐ Over $6M

Experience (circle any): Resale New Homes Commercial Property Management

Past Work Experience _____

Why Real Estate?: _____

☐ Full Time ☐ Part Time

Long term goals for real estate? _____

Ever purchase a home?: _____ If so, how many? _____

Considering any other Real Estate companies? _____

Additional comments: _____

Follow up dates / notes: _____